HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Atlantic

CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2017

Highlights

- The overall vacancy rate for standard spaces was 11.4% in 2017.
- Provincial vacancy rates were lowest in Nova Scotia and highest in Newfoundland and Labrador.
- In Newfoundland and Labrador, Prince Edward Island, and New Brunswick more than half of all standard spaces rent for less than $2,500 per month, while average rents in Nova Scotia are generally higher.
- Nova Scotia reported the highest average rent for a one bedroom standard space at $3,291, while New Brunswick's was the lowest at $2,160.

Figure 1

Source: CMHC 2017 Seniors' Housing Survey.

Table of Contents

1 Highlights

4 Data Tables

9 Methodology

10 Definitions

Previous Seniors' Housing Reports were mainly descriptive. In an effort to produce a more meaningful report, the text in the report has been shortened to focus only on key highlights while continuing to give you the data tables you have always received. An optional spotlight section focusing on topics related to the Seniors' Housing Market is included in some reports.

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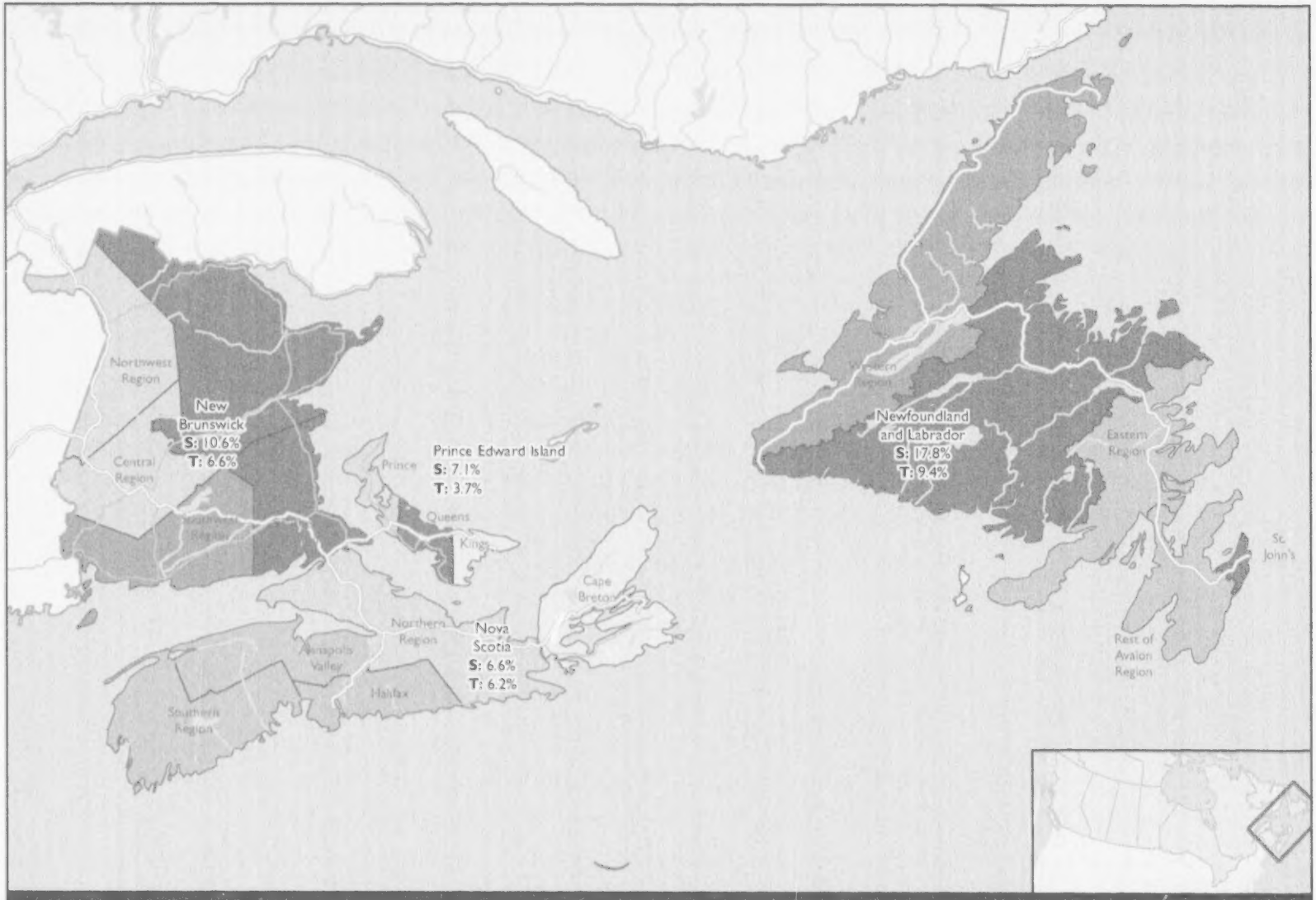

Atlantic Vacancy Rate of Standard and Total (Universe) Spaces

Region Total
S: 11.4%
T: 7.2%

S: Standard Spaces
T: Total Spaces (Universe)

Number of Structures
4 | 5 - 8 | 9 - 11 | 12 - 14 | 15 - 18

0 50 100 200 km

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

Standard Tables		Page
1.1	Vacancy Rates (%) of Standard Spaces by Unit Type	4
1.2	Vacancy Rates of Standard Spaces (%) by Rent Range ($)	4
1.4	Universe, Number of Residents Living in Universe and Capture Rate (%)	5
2.1	Universe of Total Spaces by Unit Type	5
2.2	Universe by Unit Type	6
2.3	Universe of Standard Spaces by Rent Range ($)	6
2.4	Proportion (%) of Structures where Select Services are Available by Structure Size	7
2.5	Proportion (%) of Structures with Access to Selected Amenities by Structure Size	8
3.1	Average Rent ($) of Standard Spaces by Unit Type	8

1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Newfoundland and Labrador	21.1	41.7	3.2	10.5	6.1	4.9	**	**	13.0	17.8
Prince Edward Island	6.8	15.6	8.4	6.2	2.3	1.8	**	**	6.2	7.1
Nova Scotia	10.0	52.0	10.5	10.6	5.3	4.3	12.5	8.7	7.6	6.6
New Brunswick	10.7	34.1	7.9	11.3	7.1	9.1	5.6	10.3	7.3	10.6
Atlantic Region	**18.4**	**36.7**	**7.3**	**9.9**	**5.9**	**6.1**	**9.6**	**8.5**	**9.7**	**11.4**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Atlantic Region

Province	Less than $2,000		$2,000 - $2,499		$2,500 - $2,999		$3,000 - $3,499		$3,500 and More		Total Where Rents are Known	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Newfoundland and Labrador	**	**	15.7	29.4	2.8	4.9	2.6	**	3.6	2.9	13.2	19.2
Prince Edward Island	5.6	**	12.8	8.8	1.1	1.9	1.0	**	12.1	7.0	6.9	7.1
Nova Scotia	10.8	7.2	5.5	7.7	11.2	5.0	5.8	10.2	3.1	5.8	7.5	6.6
New Brunswick	13.0	8.1	9.3	8.6	8.6	5.1	**	12.4	8.3	32.6	10.0	10.6
Atlantic Region	**9.5**	**7.9**	**14.5**	**18.3**	**6.9**	**4.9**	**4.4**	**8.7**	**5.5**	**9.9**	**10.6**	**11.7**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Atlantic Region

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2016	2017				
Newfoundland and Labrador	3,701	12.7	9.4	68	3,373	37,951	8.9
Avalon Region	1,590	9.2	6.5	29	1,491		
Central & Eastern Region	1,411	16.2	12.5	25	1,239		
Labrador & Western Region	700	14.3	9.3	14	643		
Prince Edward Island	1,273	6.5	3.7	29	1,245	11,011	11.3
Kings & Prince County	421	5.0	4.0	11	407		
Queens	852	7.4	3.6	18	838		
Nova Scotia	1,688	7.3	6.2	42	**	75,624	**
Halifax	690	3.5	3.0	10	**		
Northern Region & Cape Breton	450	11.3	6.9	12	439		
Southern Region and Annapolis	548	9.7	9.7	20	510		
New Brunswick	3,418	7.3	6.6	58	3,233	61,327	5.3
Northwest, Northeast & Central Region	1,311	12.5	7.5	29	1,226		
Southwest & Southeast Region	2,107	3.2	6.0	29	2,007		
Atlantic Region	**10,080**	**9.6**	**7.2**	**197**	**9,472**	**185,913**	**5.1**

[1] Source: Statistics Canada. Table 051-0001 - Estimates of population, by age group and sex for July 1, Canada, provinces and territories, annual (persons unless otherwise noted) (accessed: March 09, 2017).

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

2.1 Universe of Total Spaces by Unit Type
Atlantic Region

Province	Ward/Semi Private	Bachelor/Studio	One Bedroom	Two Bedroom +	Total
Newfoundland and Labrador	1,743	486	1,436	36	3,701
Prince Edward Island	442	541	262	28	1,273
Nova Scotia	94	417	947	230	1,688
New Brunswick	144	1,583	1,509	182	3,418
Atlantic Region	**2,423**	**3,027**	**4,154**	**476**	**10,080**

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2.2 Universe by Unit Type
Atlantic Region

Province	Ward/Semi Private	Bachelor/ Studio	One Bedroom	Two Bedroom +	Total
Newfoundland and Labrador	1,743	486	1,436	36	3,701
Standard Spaces	616	234	954	36	1,840
Non-Standard Spaces	1,121	215	482	-	1,818
Unknown Spaces	6	37	-	-	43
Prince Edward Island	442	541	262	28	1,273
Standard Spaces	144	277	164	27	612
Non-Standard Spaces	280	185	94	1	560
Unknown Spaces	18	79	4	-	101
Nova Scotia	94	417	947	230	1,688
Standard Spaces	25	176	719	188	1,108
Non-Standard Spaces	69	69	23	-	161
Unknown Spaces	-	172	205	42	419
New Brunswick	144	1,583	1,509	182	3,418
Standard Spaces	62	616	1,152	143	1,973
Non-Standard Spaces	80	889	191	39	1,199
Unknown Spaces	2	78	166	-	246
Atlantic Region	**2,423**	**3,027**	**4,154**	**476**	**10,080**
Standard Spaces	847	1,303	2,989	394	5,533
Non-Standard Spaces	1,550	1,358	790	40	3,738
Unknown Spaces	26	366	375	42	809

2.3 Universe of Standard Spaces and Rent Range ($)
Atlantic Region

Province	Less than $2,000	$2,000 - $2,499	$2,500 - $2,999	$3,000 - $3,499	$3,500 +
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Newfoundland and Labrador	0.2	60.3	17.9	9.4	12.3
Prince Edward Island	2.6	45.0	7.8	4.2	40.4
Nova Scotia	17.4	11.1	23.3	13.0	35.2
New Brunswick	25.2	34.7	17.6	13.1	9.5
Atlantic Region	**13.5**	**37.3**	**18.0**	**11.0**	**20.2**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size Atlantic Region

Province	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Newfoundland and Labrador	0.0	1.6	0.0	98.4	33.2 a	12.2 c	83.6	4.6
10 - 49	0.0	0.0	0.0	100.0	31.6 a	14.0 c	69.0	7.2
50 - 89	0.0	0.0	0.0	100.0	32.2 a	7.3 c	92.7	3.5
90 or more	**	**	**	89.7	**	**	100.0	**
Prince Edward Island	0.0	0.0	3.7	96.3	64.7 a	50.5 a	96.3	3.4
10 - 49	0.0	0.0	5.4	94.6	58.5 a	**	94.6	0.0
50 - 89	**	**	**	100.0	75.0 a	75.7 a	100.0	12.1
90 or more	**	**	**	**	**	**	**	**
Nova Scotia	0.0	9.5	**	**	61.9 a	**	90.5	**
10 - 49	0.0	6.5	16.1	77.4	**	16.1 d	90.3	**
50 - 89	0.0	50.0	0.0	50.0	75.0 a	0.0 a	75.0	0.0
90 or more	**	**	**	**	**	**	100.0	**
New Brunswick	3.4	**	9.5	79.2	55.1 a	39.5 a	91.1	13.4
10 - 49	0.0	0.0	0.0	100.0	**	23.4 d	85.0	11.8
50 - 89	5.1	**	**	60.3	69.2 a	62.7 a	100.0	**
90 or more	9.1	**	**	**	**	**	90.9	**
Atlantic Region	**1.0**	**4.9**	**7.2**	**87.0**	**50.4 a**	**27.1 a**	**89.2**	**8.3**
10 - 49	0.0	1.9	5.6	92.5	46.1 a	21.3 a	83.9	**
50 - 89	1.7	7.2	7.3	83.8	52.9 a	34.1 a	94.9	7.1
90 or more	3.4	**	**	**	**	**	96.6	**

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Atlantic Region

Province	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	87.7	0.0	4.5	12.0	25.6	82.2
10 - 49	89.4	0.0	10.4	10.2	17.2	76.0
50 - 89	89.0	0.0	0.0	0.0	25.3	89.2
90 or more	79.3	**	**	50.6	50.6	80.5
Prince Edward Island	61.1	0.0	0.0	10.8	**	85.6
10 - 49	68.7	0.0	0.0	**	**	78.8
50 - 89	**	**	**	**	62.9	100.0
90 or more	**	**	**	**	**	**
Nova Scotia	**	0.0	4.8	**	**	97.6
10 - 49	**	0.0	6.5	6.5	**	96.8
50 - 89	25.0	0.0	0.0	0.0	25.0	100.0
90 or more	100.0	**	**	100.0	100.0	100.0
New Brunswick	72.2	3.8	17.0	59.3	48.6	87.2
10 - 49	65.0	0.0	0.0	57.7	**	81.4
50 - 89	78.1	**	**	66.8	72.3	94.2
90 or more	79.9	9.1	**	**	89.6	89.6
Atlantic Region	**75.0**	**1.1**	**7.6**	**27.8**	**35.3**	**87.5**
10 - 49	72.6	0.0	4.7	22.3	17.6	83.9
50 - 89	76.0	**	11.0	21.6	45.7	93.0
90 or more	81.6	3.4	**	**	78.8	89.3

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Newfoundland and Labrador	2,216	2,296	2,455	2,761	2,589	2,895	**	**	2,403	2,706
Prince Edward Island	2,248	2,313	2,790	3,432	2,825	2,762	**	**	2,649	3,088
Nova Scotia	3,249	2,942	2,832	2,864	2,929	3,291	2,626	2,844	2,867	3,156
New Brunswick	3,216	2,497	2,238	2,297	2,226	2,160	**	3,257	2,325	2,294
Atlantic Region	**2,264**	**2,334**	**2,620**	**2,707**	**2,613**	**2,740**	**2,860**	**3,305**	**2,523**	**2,718**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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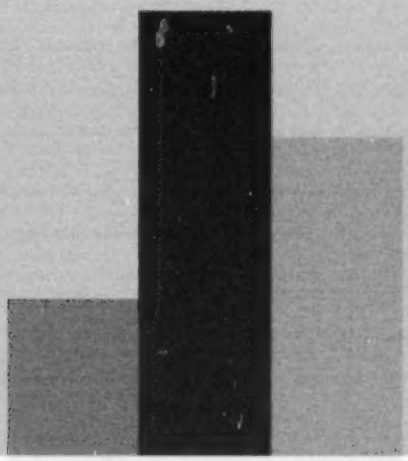

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